

Convening Host Planning Guide



Introduction

Thank you for hosting the CPED convening! We look forward to creating a successful event with you and your institution.

Our annual convening is at the heart of CPED’s work –connecting a diverse set of institutions with the common goal of collaboration for the improvement of professional practice preparation in education. As a host institution, you will further this goal as well as have the opportunity to share your accomplishments around redesigning the EdD.

As you begin to plan for the convening, the CPED Team invites you to review this guide to assist in preparations. Combining the lessons learned, wisdom of prior hosts, and suggestions from members, this guide should give you an overview of the basic structures, needs, and “to dos” to plan and host a convening. The CPED Team will work closely with your team to plan the convening.

We look forward to working together with you to provide a rich and meaningful CPED convening.

Thankfully yours,



Jill A. Perry
Executive Director

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CPED Convenings at a Glance

Who?

Size	Approximately 300-350 People
Participants	Deans, Program Directors, Faculty, Students
Participant Locations	From across the U.S., Canada, Asia, and Europe
Groups	Members institutions are represented by individuals or small teams; others at CPED's invitation
Experience	Some have attended convenings since 2008 while others will be attending their first convening.

What?

Pre-Convening	Half-day workshops (paid, includes breakfast or a boxed lunch)
Welcome	Welcome from CPED and host institutions leaders
Convening	2.5-3.5 days of large group and break-out sessions
Breaks	Time throughout the day for networking and meals
Meetings	Opportunities for CPED leadership groups to meet and discuss CPED business
Social Time	Planned reception: food, drinks, entertainment (optional)
Local Activity	Planned evening activity that shows members some distinct part of the city (optional)
Other Activities	Other activities to promote community/tourism (optional)

Where?

Accommodations	Hotel(s) at or near Convening venue
Location	Near hotels, restaurants, and other amenities for out-of-town guests
Site	1 large presentation/meeting room, 6+ smaller breakout rooms, and informal social/meeting spaces, registration table

When?

Time of Year	Mid to late October
Duration	Three (to four) days
Time of Day	Approximately 8:30am to 5pm for sessions, social/networking events to follow

Why?

Showcase	...the host institution’s CPED-influenced programs
Engage	...institutions in CPED activities
Promote	...tourism in the host institution’s city
Budget	With an actively managed budget, it can be a cost-neutral activity.

Host Responsibilities

Event Planning	Event planning, catering, supplies, and support in consultation with the CPED Leadership team
Budget	Manage budget and convening finances in collaboration with CPED
Insurance	Maintain insurance in the event of injury/emergency on site during the convening

About the CPED Convening

The signature event of the Carnegie Project on the Education Doctorate is a “convening.” The term is meant to convey not only that these meetings are different from traditional conferences but also that the central feature is *coming together*. At times, we have also invited observers—graduate deans, disciplinary society leaders, and leaders from foundations and agencies—to participate.

Each convening has specific goals, and a significant amount of work occurs beforehand—on the part of the planners and the participants—to ensure that those goals are reached. Beyond the particular goals of any given convening, every convening is planned to create an environment where people trust each other enough to share ideas openly, give honest feedback, and respond respectfully to disagreements.

Knowing that we are far from having all the answers, we have prioritized creating a setting that allows others to generate and share ideas. Therefore, five ideas originally created by Chris Golde and her Carnegie Initiative on the Doctorate (CID) colleagues shepherd the development of the CPED convenings’ goals and agenda. The ideas are:

1. *Idea-centered*. Proactive ideas are always at the heart of a CPED convening as a starting point for conversations. By starting with, and returning to, ideas, participants’ attention stays focused on larger questions of purpose—Why do we want to change our program? To what ends? What are promising strategies? Just as importantly, the agenda always includes opportunities to take risks. Convenings give people time and space to try out (and often reject) new ideas. By encouraging true intellectual imagination, new energy and ideas can be tested, regardless of the final outcome.
2. *A mixture of pedagogies*. We attempt to utilize a mixture of formats, including large group sessions, team-work time, structured small groups, presentations and social occasions.

Basic pedagogical principles help structure the agenda: we change the format every couple of hours; we make sure that participants have many opportunities to actively engage, rather than just listening.

3. *Multiple voices.* CPED convenings are deliberately structured to include diverse opportunities for participants to engage with one another and with the central themes of the meeting, and so it is important that everyone be able to participate fully. We want to provide opportunities for participants to share ideas, both formally and informally, with others in presentations and discussions.
4. *High expectations.* It is tempting to acknowledge the amount of work on every student and faculty members' plate and thus set low demands for preparation for a convening. But in fact, we set high expectations and ask each participant to complete several assignments in advance, which can involve consulting widely with the leadership team and other members of the department. We usually send background readings as well. By asking a lot, we send the signal that convenings are an opportunity to share departments' work, including their successes and setbacks, with other departments in a spirit of candor and the camaraderie of a shared mission.
5. *Unstructured conversations.* Last but not least, the CPED convenings include the all-important social components. We seek to provide many opportunities to mix participants by role (student, faculty, observer, CPED staff). A simple question over wine, a new idea generated over coffee: these are moments of intellectual engagement that can be planned but not scripted.

CPED Convening Sessions Space and Purpose

Convenings require space for a number of different types of gatherings. These spaces include:

1. A large primary meeting space for all participants to assemble for large group presentations at tables with presenter space at the head of the room (approximately 300-350 people);
2. A series of six or more smaller "breakout rooms" for concurrent sessions, ideally with flexible space (approximately 35-50 people);
3. Informal meeting spaces in which participants can meet for coffee and discussion.

Convening sessions are **high touch and low tech** which means we will not offer projectors and screens to presenters. Rather, we encourage interactive sessions that are designed to:

- 1) Accommodate the growing numbers and diverse needs of members;
- 2) Provide more "hands on" and engaging learning opportunities about program design that pushes our thinking;
- 3) Learn from and with each other, and as we do, strive to improve CPED programs;
- 4) Offer an academic opportunity for those presenting; and

- 5) Continue to work together as a consortium to develop, test, and improve CPED notions for professional practice preparation.

Learning Exchanges: The Types of Convening Sessions

Convening sessions are called “Learning Exchanges” and comprise of two formats —small group learning exchanges (aka breakouts), and full group learning exchanges (e.g., everyone together in main room).

All learning exchanges MUST consider the convening theme and seek to both teach and learn with CPED participants. “Show and tells” are not the goal.

Small Group Exchanges

The following categories have been created for the types of exchange sessions that include activities that will promote greater levels of interactivity and engagement for participants in small groups. These sessions happen on each day of the convening in breakout meeting rooms.

Type of Exchange	Description	Examples of activities
Learning and Innovation	These sessions are planned presentations delivered by one or more CPED member participants using a variety of engaging activities and providing opportunities for facilitated learning about programs and selected topics. They are presented concurrently with other exchanges.	<ul style="list-style-type: none"> • Workshopping ideas • Program case study • Flipped learning session • Panel presentation • Ignite session
Dialogue	These sessions involve facilitation of discussion and dialogue among exchange participants. The session may be highly organized or make room for spontaneous discussion and activities. These sessions are presented concurrently with other exchanges.	<ul style="list-style-type: none"> • Roundtable • Fishbowl • Jigsaw • World cafe • Film screening & discussion • Challenge room • Speed dating • Book/article discussion • Networking
Team-Building and Creation	These sessions facilitate the development of relationships among CPED members through the creation of plans, resources, research, and other materials. These sessions are presented concurrently with other exchanges.	<ul style="list-style-type: none"> • Research pitch activity • Writing pitch activity • Collaborative syllabus development • Collaborative material creation (program policy or

		documentation; assignments; assessment rubrics) <ul style="list-style-type: none"> • Arts-based activity • Team/trust-building activity
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Full Group Learning Exchange(s)

This type of session will be presented to all convening attendees in the main ballroom. Full exchanges are usually reserved for the host institution and/or a keynote speaker. They should be engaging, learning-focused, and interactive. The host institution, in collaboration with the CPED Executive Director, will work together to design and implement this session(s). These sessions typically happen on days 1 and 2 of the convening in the large/primary meeting room.

Type of Exchange	Description	Format/Examples
Inspire	This session is organized to provide a largely uni-directional planned presentation to the CPED community. These exchanges contain a table discussion that is meant to be informational as well as inspiring by drawing the larger group into the topic.	<ul style="list-style-type: none"> • Keynote/Guest speaker • Fireside chat • Debate • Crowd-sourced audience questions
Discovery	These sessions generally involve multiple presenters/leaders who facilitate planned, fast-paced discovery and incubation of new ideas and innovations. This session contains a table discussion and often the production of something at each table.	<ul style="list-style-type: none"> • Lightning papers/ignite • Pecha kuccha • Campfire discussion • (Virtual) Poster session

Roles & Responsibilities

Convening planning is divided between the CPED Leadership team and members of the host institution. Ideally, a semi-formal convening planning group is established to work collaboratively. In some instances, autonomy is given to the host institution to make decisions based on their knowledge of the location, culture, and context of their organization. In other instances, the CPED Leadership team will make recommendations based on their experience with past convenings. The convening planning group will strive to meet monthly and then weekly (or on an as-needed basis), starting approximately 6-9 months before the convening is scheduled to take place.

Below is an outline of the responsibilities each entity (CPED and convening host) has for the various aspects of planning. A more in-depth description of these roles can be found in the following pages. A representative of the host institution is asked to sign a form acknowledging these and other responsibilities (included at the end of this document).

The CPED Team -- Executive Director, Coordinator of Operations & Development, Communications person, and/or Graduate Assistant-/intern- work together and are responsible for:

- Co-constructing convening theme with host
- Convening agenda design
- Co-constructing program content-- presenters, exchanges, large sessions
- Co-organized full exchange sessions/keynote speakers
- Convening marketing
- Registration management, including fee collection
- Registrant information collection, including dietary restrictions, accessibility requests, and guest information

The Host institution (which generally provides 2-4 core planning team members) is responsible for:

Convening Host Checklist

	1.5 to 2 yrs. Before Convening	Review and then choose host hotel.
	June -August the year before the Convening	Develop theme for Convening.
	September the year before Convening	Create promo video for next year’s Convening to be shown at current year’s convening.
	October the year before convening	Present promo vides at current year’s convening.
	November the year before the convening – January of Convening Year	Write Call of Exchanges and Workshops with CPED Executive Director.
	December the year before Convening – May of Convening Year	Work on obtaining keynote speaker(s) for convening.
	April of Convening Year	Determine how many exchanges host institution would like to have in convening agenda.
	August of Convening Year	Determine/order swag for swag bag if desired.

Clarifications/Additional Details of Host Responsibilities

- Co-developing and managing a convening budget with costs in collaboration with the CPED Team
- Negotiate conference rate and block rooms at local hotel(s) and securing booking information

- Securing meeting space (at least six breakout rooms and one large meeting room)
- Ensuring technical support and Wi-Fi
- Selecting food and beverage for registrants and guests in collaboration with the CPED Team
- Securing local transportation (if needed)
- Managing on-site logistics
- Providing volunteers
- Photocopying and assembling convening materials

As with all other activities of CPED, all members of the convening planning group abide by CPED's Values and Norms of Engagement. Thus, the group should strive to be open, proactive, accountable, communicative, and respectful. Expectations and concerns should be communicated clearly and openly with understanding and respect for each other's time and perspectives. Where there may be misunderstanding or disagreements, the convening planning group should follow the direction of the Executive Director.

Note: If this is your first time organizing a large conference or convening, know that the CPED Team has plenty of experience with event planning. They are a helpful resource, and the Host institution is encouraged to contact them with any questions or concerns that may arise. "Expecting the unexpected" is common with event planning, but with patience and teamwork any challenge can be overcome.

Finances

The budget for the convening is based on the registration fee multiplied by the number of expected participants. In addition, the Host institution will be exempt from paying the annual dues for the year they host the convening. Institutions that co-host a convening with another institution will only be exempted from paying half of the annual dues.

Within this amount (registration fee x # participants), the Host (in collaboration with the CPED Team) will work to cover the cost of meeting space rental, Wi-Fi access, and food (approx. 3 lunches, 4 breaks, 1 reception minimum) and beverages for guests. CPED will collect convening fees through its registration management system. Normally, convening registration fees are **not** taken on-site.

Note: If the Host institution wishes to arrange an additional travel/tourism activity for registrants at an additional cost, all activity arrangements must be made by the Host institution, and the cost of the activity per person communicated to the CPED team at least 4-months prior to the convening. The additional activity cost will be added to the registration page. CPED, through the registration page, will obtain a head count of activity participants and supply that number to the Host institution.

Pre-Convening Planning & Timeline

When	What	Who
1.5 - 2 yrs in advance	POC and/or delegate secures hotel for the next convening year. Review budget with CPED team	Host & consult CPED team
July – August (Previous Year)	Work with next year’s convening host institution on convening video. Develop convening theme.	Theme: CPED & Host Video: Host
October (Previous Year)	Next year’s convening promo presented at current year’s convening.	Host
October (previous year) – January (convening year)	Work on writing Convening Call	CPED & Host
Late January	Convening Call for Exchanges, Workshops, & Posters posted on CPED website	CPED & Host
February	Establish host committee and start developing host university’s exchanges.	Host
Late February	Start Monthly Convening Meetings. Review budget.	CPED & Host
Early June	Start bi-weekly Meetings	CPED & Host
July	Start Weekly Convening Meetings	CPED & Host

Establish a Primary Point of Contact (POC)

Designate a key person at your institution to serve as the POC between CPED, the Host institution, and the hotel(s) where members will stay.

➤ **Convening Deadline**

Determine who will serve as the POC at the host institution and inform CPED team.

The POC can be the CPED Delegate, administrative staff, or conference coordinator at the Host institution. The POC should be able to commit to organizing and/or delegating the organization of all items listed in the Roles and Responsibilities section and able to arrange/attend meetings with the convening planning group as needed.

Accommodations: Selected by Host institution/POC

- Select a hotel (two, if possible) within close proximity to campus and to restaurants in the area that offers comfortable, clean, and affordable accommodations.

- Seek clarification about the hotel’s policy on block reservations and room releases (i.e., if a deposit is required and/or non-refundable). Note: The Host institution should not guarantee any rooms.
- Secure a block of rooms and group rates for the convening schedule **plus** the day prior to the start to accommodate travel schedules.
- Find a hotel that offers accommodations for those with accessibility needs.
- If the hotel is not within proximity (>15-minute walk), negotiate transportation to/from convening site.
- Negotiate group/institutional rates that include internet and, if possible, transportation to/from the airport.
- Book a block of rooms with a cut-off date for reservations 30-days prior to the convening (block 10-20% more rooms than the anticipated).
- Note if continental breakfast is served for free or at a cost.
- Provide CPED Coordinator (info@cped.org and **412.648.7428**) with the following hotel information:
 - Name & location (address)
 - Contact information
 - Group rate and booking code
 - Phone and website link for booking
 - Distance and transportation
 - If breakfast is included
 - Other relevant details

Accommodations Notes

- Guests will make their own reservations with the hotel directly (specific link or phone number).
- To ensure we make the required number of room reservations, the CPED Coordinator will coordinate with POC to compare registration numbers with hotel booking numbers to ensure all CPED participants have booked accommodation space.
- The POC should keep track of accommodation bookings and be prepared to find an additional hotel/accommodation for registrants if the first hotel block(s) fill to capacity.

Meeting Spaces

- Meeting space can be on the host’s campus (if close to hotel and available) or in the hotel meeting space.
- In general, the convening requires 1 large ballroom for full exchange/keynotes/meals and 6-8 breakout rooms that accommodate 35-50 people per room.
- The primary (large group) meeting space should comfortably accommodate approximately 300-350 people and should have technological capabilities for PowerPoint, video, and amplified sound for presentations. The primary room should have:
 - round tables that seat approximately 8-10 people and allow participants to easily see the presentation area (half tables of 6 facing forward is best)

- head table for 4-6 people
- podium, microphones, and lavalier microphones available.
- For learning exchange, convening will need at least 6 breakout rooms in close proximity to primary meeting space that can accommodate 35-50 people each and have wireless internet.
- Registration space outside of primary room with 2-3 long tables and chairs.
- Sponsor tables near the registration space.
- If part of the program, we need space and/or tripods for displaying posters.
- Signage throughout the building to direct participants.

Local transportation

- Arrange transport to/from the hotel before and after the convening if the meeting location is not walking distance from the hotel. A number of shuttles should be arranged to accommodate large numbers of people.
- Provide clear instructions (and signage if necessary) about transportation to the CPED Coordinator and, ideally, at the hotel.

Website

- CPED team will post convening travel, accommodation, and any other activity details on the website. Please provide these details by:
 - **February 1st** for Convening

Registration

- Approximately 4-6 months before the convening, CPED team will e-blast an invitation to register and book a hotel for all CPED members.
 - REGISTRATION FOR THE CONVENING INVITE: **Early spring**
- Participants will be asked to register for the convening, pay registration fees, and book their hotel link via the CPED website.
- Participant registration information will include requests for dietary restrictions or other accommodations as well as additional guests.
- A list of participants will be generated from this registration and shared with the Host POC.
- CPED staff will send reminders to CPED membership up until the registration deadline to encourage members to register:
 - Registration Deadline Convening: **SEPTEMBER 15th -30th (Two weeks before convening)**

Food and Beverage

Food and beverage costs should be finalized based on the registration numbers following the deadlines. Dietary restrictions may apply (and must be accommodated) to some guests.

The following meals/breaks/drinks should be ordered:

- Day 1: Coffee, tea, boxed lunch or breakfast (workshops, Delegates meeting, Board meeting)
- Day 2: Coffee, morning break, lunch, afternoon break, reception (dinner optional)
- Day 3: Coffee, morning break, lunch, afternoon break

Some events, such as the reception or dinner, may accommodate the guests of registrants. Additional costs for guests should be negotiated with the meeting site and communicated to the CPED Team so that the registration page can provide the guest option for an extra cost.

Convening receptions/dinners are meant to be social affairs. In terms of providing alcoholic beverages, the provision of drink tickets for one-two alcoholic beverages at a reception/dinner has been the norm.

Overview of the Day-to-Day

The convening covers three-four days, usually Monday –Thursday or Tuesday-Friday. Though weekends are also an option. The “traditional” agenda is shaped as follows:

Day 1 (Pre-convening morning/convening opening afternoon)

Morning: 8:00am-12:00pm

- CPED Governance Meetings (Delegates and Board)
- Pre-Convening Workshops
- Registration open

Afternoon: 1:00pm

- Convening begins
- Learning Exchanges

Evening: 4:30pm and beyond

- The Host institution is welcome to host a reception event, or the evening can be free for participants to enjoy the local eateries.

Day 2 (Full day)

Morning: 8:30am start

- Registration available prior to opening welcome
- Participants should get breakfast on their own, but light snacks and coffee should be provided throughout the morning.
- Morning may consist of full consortium sessions starting with the welcome at 8:30am and large group exchange sessions following or these could be done during lunch time.
- Learning Exchanges

Lunch: 12:00-1:00pm

- Lunch should be served to all participants either as buffet or boxed lunch.

Afternoon: 1:00pm-5:30pm

- Light snacks and coffee should be provided throughout the afternoon.

- The afternoon will consist of learning exchange sessions.

Evening: 5:30pm and beyond

- The Host institution hosts a reception with drink tickets and hors d'oeuvres or free evening

Day 3 (Full day)

Morning: 8:30am start

- Participants should get breakfast on their own but light snacks and coffee should be provided throughout the morning.
- Morning will consist of full consortium sessions and learning exchange sessions.

Lunch: 12:00-1:00pm

Lunch should be served to all participants either as a buffet or boxed lunch.

Afternoon: 1:00pm-4:30pm

- Light snacks and coffee should be provided throughout the afternoon.
- The afternoon will consist of learning exchange sessions.

Day 4 (half day)

Morning: 8:30am start

- Participants should get breakfast on their own but light snacks and coffee should be provided throughout the morning.
- Morning will consist of full consortium sessions and learning exchange sessions.

Lunch: 12:00-1:00pm

Lunch should be served to all participants either as a buffet or boxed lunch.

Afternoon: 1:00pm

- Closing

Note: Coffee and water should be available all day and throughout the convening.

Creating the Convening Agenda

Convening Planning Group

The agenda is planned by the CPED team in collaboration with a convening planning group made up of the POC and others who are able to commit their time. The convening planning group will begin to meet weekly 6-9 months in advance of the convening. To see a sample of the convening agenda, ask the CPED team.

Host Learning Exchange(s)

The Host institution is invited to present their program as one large exchange or two small exchanges in a creative and interactive format that will allow for participants to learn from the host's EdD program design as well as for the host institution to utilize participants to receive critical feedback.

Ideas for this exchange include:

- Student dissertation presentations
- Presentations by practitioners involved in program design/teaching
- Overview of an innovative aspect of the program
- Faculty speaking about distinctions in instruction and/or advisory

In addition, the Dean of the Host institution will be given 10-15 minutes to welcome participants at some point during the first day.

Once the general agenda has been created, the Convening Planning Group will work together to provide a detailed schedule. For example, the POC should prepare a list of speakers (names, positions) for each "welcome" slot. The CPED Team will provide the details of the Learning Exchanges.

On-Site Logistics

Registration

- Registration tables should be located at the main entrance of the primary convening space.
- The CPED staff team will arrive a day before to facilitate the registration set-up and work with host staff on last-minute details.
- Two or three aides (host students or faculty) are generally needed to assist with registration. It is also useful to have a volunteer available for addressing problems or giving information/directions.
- It is helpful to have a master list of participants and extra nametags for dealing with any problems that might arise.

Nametags

- Nametags should be standard size and able to hang around the neck or clip to clothing.
- CPED Team will design and print the name tags.

NEW! Convening App

In recent years, we have been using an app for the materials that are traditionally in folders/packets. The CPED Team will work with the app and the host institution to include the proper materials.

Convening Materials

- CPED materials will be provided ahead of time and shipped or emailed directly to the host institution (normally between 1 and 2 weeks).
- The host institution is responsible for assembling swag bags (if desired) and photocopying signs and any other necessary materials.

Prepared by CPED staff:

1. Convening agenda (on the app)
2. Any other materials
3. Nametags with clips/lanyards

Provided by Host:

4. Host institution information: campus map, EdD program information, SoE information, other promotional materials (to CPED for the app)
5. List of local restaurants and amenities (to CPED for the app)
6. Phone numbers for taxi/shuttles/hotels (paper or to CPED for the app)
7. Wi-Fi information (if applicable)

Swag Bags

In the past, host institutions have taken the opportunity to assemble “swag bags” for members. Items have included university gear, local tourism gear, etc. Providing a swag bag is not mandatory and should be decided at the discretion of the host. Additionally, CPED may add materials to these bags including book(s) and/or CPED swag.

Meeting Room Audio/Visual Technology and Materials

To implement the convening, the following AV materials and resources will be needed:

- For primary meeting room:
 - Projector and screen
 - Audio (including wireless microphone with amplified sound) for podium and head table presenters
 - Access to a video camera to record guest speakers (need AV person to record)
- For breakout meeting rooms:
 - Chart paper
 - Markers
 - Sticky notes
 - Presenters will bring their own computers.
- Please negotiate with the convening location in advance that the following will be provided:
 - Audio-visual staff member on-hand for full three days to help with set up and troubleshooting
 - Wireless access to the internet in all meeting rooms (if financially possible)
 - Mac & PC cords (if needed for rooms)

CPED Technology Philosophy

In 2024, CPED shifted to a high-touch, low-tech model of conference planning. This model expresses our values of collaboration and community. As a result, we will **not** be placing projectors and screens in breakout exchange rooms. CPED will ensure that Wi-Fi is available throughout the convening space which will enable presenters to facilitate collaborative work on computers/tablets. Additionally, all presenter materials will be accessible in the convening app. We encourage presenters to be creative, interactive, and engaging in their exchanges.

Table set-up

- In the primary room, roundtables that seat 8-10 people with tablecloths.
- Tables should have pitchers of water & cups.
- If available, pens/pencils/pads/tent signs (if needed) can be put on tables in the primary and breakout rooms.

Keynote Presenter Needs

To display pre-work assignments, some convening presenters may need access to tripods, Post-it chart paper, markers and other supplies. CPED staff will be in communication to alert the POC of these needs in a timely manner.

Coat racks

A place to hang coats is essential if the location has cold weather.

Food Table Set-up

An area with tables needs to be designated for breaks and buffets. A coffee station should be set up in a high traffic/highly visible area.

Food and Beverage

Meals Provided

Breakfast: Most hotels now provide a complimentary breakfast. It is suggested that participants eat breakfast before arrival at the convening. Please confirm with the hotel that breakfast is available.

All day: There should be a beverage set-up refreshed throughout the convening. Coffee, tea, and water should be available all day.

Breaks: Breaks generally take place in mid-morning and mid-afternoon. Mid-morning can consist of coffee, tea, and juice refreshers and fruit for a snack. Afternoon breaks should include beverages and a light snack such as nuts or granola bars; protein-filled snacks are good to keep folks awake!

Lunches: Boxed lunches are needed for the first day workshop participants. A full lunch will be provided for all participants on the second and third days. A lighter fare is easier for afternoon work. Include coffee and light dessert.

Reception or Dinner: A hosted welcome reception or dinner should be provided one evening of the convening (typically the second evening). The host institution has an opportunity to highlight local cuisine and offer an opportunity for host students and faculty to mingle with CPED participants through informal or formal presentations.

Guests: Some members may bring a guest to the social events, i.e., reception, dinner. If the hosting institution needs to charge a guest fee, please inform the CPED staff well before registration starts.

Note regarding dietary restrictions: The CPED Leadership team will ask members for food allergies/preferences on the registration form and will notify the host institution coordinator. We generally have a few vegetarians and gluten-free folks. Ensure that the convening site is given plenty of notice about dietary restrictions and that food orders are clearly marked. If a dietary restriction cannot be accommodated, please inform the CPED Leadership team.

Accessibility

The CPED Leadership team will ask members for any accessibility needs and appropriate accommodations. The POC should consult with the convening manager to prepare in advance for participant requests to meet accessibility needs.

Contact Information

CPED staff are available to help plan the convening. Please refer to the list below to select the appropriate person for assistance.

Monica DuPree Wilkerson, CPED Coordinator of Operations and Management

monica.wilkerson@cped.org

Office: 412-648-7428

Contact regarding: Registration and fee payment, website & promotion of convening, general attendance questions, and payments for convening needs, on-site program and hotel logistics.

Jill A. Perry, Executive Director

jillaperry@cped.org

Office: 412-624-7272

Contact regarding: Convening program content and design, materials preparation, general hosting

CPED Mailing Address:

Carnegie Project on the Education Doctorate
c/o University of Pittsburgh
School of Education
5307 Wesley W Posvar Hall
230 South Bouquet Street
Pittsburgh, PA 15260

Website for convenings: <https://cped.memberclicks.net/convenings-events->

Thanks again! We look forward to working with you.

Appendix

Tentative Schedule & Day-to-day Logistics

Pre-Convening Prep:

Printing

- Agenda (provided by CPED team)
- Session materials
- Institution information (per host institution)

Signage

- From hotel(s) to conference space
- To the registration table
- Break out rooms
- WiFi access

Registration

- Assemble convening materials (EdD program information, School of Education information (if desired), and/or other promotional materials/swag)
- Print/Assemble name tags (with additional blank name tags)
- Pens, paper on hand
- Wifi information

Pre convening or Day 1

Time/Activity		Staff
6AM	Set up Registration (name tags and Welcome bags) Signage on campus Deliver Chart paper, sticky notes, and markers to workshop rooms	1 staff; 2 volunteers
8AM	Registration OPENS—Materials needed: Master List, Laptop, Pens/Pencils, Welcome Bags	1 staff; 2 volunteers
1PM	Convening Begins with opening	1 staff; 1 volunteer
2:00-4:30 PM Move to Exchange sessions Afternoon snacks		

Convening Day 2

Time/Activity		Staff
6:30AM	Set up Registration (name tags, folders, swag bags); Signage; Confirm food/beverage service in rooms	1 staff; 1 volunteer
7:00AM	Registration OPENS—Materials needed: Laptop, Pens/Pencils, Welcome Packages/Swag Bags	1 staff; 2 volunteers
8:30AM	Convening begins with Keynote session	1 volunteer
8:30AM	Chart paper, sticky notes, and markers in rooms	2 volunteers
9:30AM	Exchange Session(s)	
10AM	Check on Exchange Sessions	1 volunteer
11AM	Clear snacks/Check on lunches List of folks who get special diet meals	1 staff member
12PM	Lunch begins	

1PM	Exchange Session(s)	
1:30PM	Check on sessions	1 staff
5:00PM	Poster Session/Reception	Staff and volunteers
5:30PM	Clear snacks and baskets Clear registration Clear EdD posters and stands (if applicable)	Staff and volunteers

Convening Day 3

Time/Activity		Staff
7:30AM	Set up Registration (name tags, folders, swag bags); signage; confirm food/beverage service in rooms	1 staff; 1 volunteer
8:30AM	Chart paper, sticky notes, and markers for rooms Set out remaining snacks.	1 staff; 1 volunteer
8:30AM	Convening begins	1 volunteer
9:30AM	Exchange Session(s)	
10AM	Check on Exchange Sessions	1 volunteer
11AM	Check on lunches	1 staff member
12PM	Lunch begins	Host institution staff
1PM	Exchange Session(s)	1 staff; 1 volunteer
1:30PM	Check on sessions	1 staff
4:30PM	Clear snacks Clear registration Clear EdD posters and stands (if applicable)	Staff and volunteers

Budget Planning and Sample Expense Report

The Host institution will have the full registration fee times the number of participants to use as a budget. The host institution is liable for any additional or unexpected costs above the registration fee times number of participants.

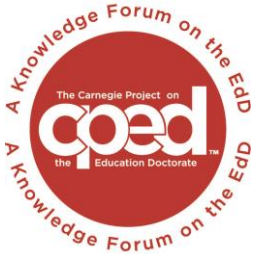
Expectation of costs include:

<u>Venue</u>	<u>Administrative</u>	<u>Reception</u>
<ul style="list-style-type: none"> • Room Fees • A/V and Internet • Catering 	<ul style="list-style-type: none"> • Supplies <ul style="list-style-type: none"> - Name Tag holders 	<ul style="list-style-type: none"> • Venue • Catering <ul style="list-style-type: none"> - Heavy hors d'oeuvres

- Coffee, tea, and water (Always Available) - Snack Breaks - Lunches	- Chart paper, sticky notes, and markers • Convening App	- Alcohol
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The sample budget below can serve as a guide.

Expenses Covered by CPED		Expenses Covered by Convening Registration Fees		Possible Host Expenses	
Convening App	\$4,000	Catering (lunches, snacks, reception)	\$75,000	University Paraphernalia (for swag bag)	\$1,000
Swag (book, paraphernalia)	\$12,000	Entertainment	\$1,000	Decorations	\$1,500
Awards	\$1,200	Exchange Rooms & Registration Supplies	\$500		
		AV	\$30,000		
		Speaker Expenses/Honorarium	\$3,000		
				Total	\$2,500
				No CPED Dues	-\$2,500
Total	\$17,200	Total	\$109,500	Total	0



Agreement to Host CPED & Institution Acknowledgement of Responsibilities

The _____ (University) an institutional member of the Carnegie Project on the Education Doctorate (CPED), and its dean and faculty members have agreed to host the annual

CPED convening in October _____. Specific dates will be determined in collaboration between CPED and the host institution team.

The host team have received and carefully read the CPED Convening Planning Manual. By signing this statement, the Dean and CPED Delegate affirm they understand and agree to carry out all Host institution responsibilities as described in the manual and below and to work collaboratively with CPED to identify in a timely manner and resolve any planning- and hosting-related issues that may arise.

We specifically acknowledge and understand that as the Host institution we are responsible for developing a convening budget in collaboration with the CPED Team based on the registration fee times the number of participants.

In appreciation for the Host institution’s contributions to the convening and commitment to carry out the agreed responsibilities, the Host institution will be exempt from paying CPED annual dues for the fiscal year in which they are hosts, based on CPED’s July 1 – June 30 FY. If two institutions partner to co-host a convening, each Host institution will benefit from a fifty percent (50%) reduction in CPED’s annual dues rather than a full exemption.

We understand that CPED is a charitable organization which has been designated a not-for-profit 501(c)(3) for federal tax purposes. To maintain its federal tax exemption, CPED must engage primarily in activities which accomplish one or more of its tax-exempt purposes. In the event any member of the CPED Team has concerns about the potential impact any convening-related activity may have on CPED’s tax-exempt status or its alignment to CPED’s vision and mission, the Host institution point of contact (POC) will work with the CPED Team to achieve a successful resolution of the issue.

We will also provide the CPED Team with documentation that the Host institution and/or hotel maintains insurance adequate in nature and scope in the event of injury/emergency on site during the convening. We further certify that the information set forth in this statement of acknowledgement is true and correct to the best of my knowledge, information, and belief.

Dean Signature	Name (Printed)	Date
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Delegate Signature	Name (Printed)	Date
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